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Briefing from a facilities management perspective

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Abstract

Purpose – To identify the management tools and variables that impact briefing, assess the nature of current briefing practices, review the need for more structured techniques and determine the place of facilities management in briefing.

Design/methodology/approach – A detailed literature review to analyse and critique the briefing process was followed by a brainstorming session to explore relevant technical frameworks. A questionnaire survey investigated opinions of structured approaches to briefing.

Findings – The facilities manager operating within the strategic framework of the client organisation and having the necessary skills is a natural choice as brief writer. Facilities managers' involvement is not strongly reflected in this research, indicating perhaps that they do not consider briefing a natural role or that they do not possess the skills for its undertaking. It is concluded that while briefing remains an unstructured investigative process, the skills for which are learned through experience, then architects and project managers will continue to dominate the activity.

Practical implications – Currently, briefing is unstructured, iterative, and uses a variety of media for its exposition. More formalised processes recognising strategic and project briefing are advocated in the literature. Options for improvement include a structured approach to investigative briefing and facilitated value management.

Originality/value – The limited involvement of facilities managers in briefing prompted this research. This paper identifies the structure and variables impacting the briefing process and concludes with options for formalised approaches to briefing.

Keywords Production services, Construction industry, Architecture, Team working

Paper type Research paper

Introduction to the research

This paper reports on an international research project that seeks to establish the role of facilities management in briefing in the UK, US and Hong Kong, and specifically whether a structured approach to the briefing process can systematically identify and clarify client requirements, and represent these requirements precisely and explicitly to facilitate the design process.

The purpose of this paper is to report on research into the establishment and validation of a framework for the briefing process. In an analysis of briefing practice,

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Barrett *et al.* (1999) conclude that there is a need to overcome the brief takers reliance on experience and to advocate a more structured process which demonstrably works. Additionally, Barrett's study argues that there may be reasons why an architect might not be the most appropriate person to take the brief. Barrett's final conclusion is; "perhaps most importantly, the overall framework used for understanding briefing needs careful consideration". Kamara *et al.* (2001) in a survey of briefing determined that the use of a structured methodology to analyse and prioritise client requirements took place in only 28 per cent of the projects reviewed. The study found that; "design drawings do not represent the clients problem *per se* but a proposed solution to the clients problem. In this regard, the framework for briefing does not seem to provide for the unambiguous representation of the clients requirements with respect to his or her problem or business need".

The briefing framework derived as a result of this research has a high correlation with those constituents of value management leading to an *a priori* proposition that value management is an appropriate approach to structured briefing. This proposition is tested by an international survey in the UK, US and Hong Kong. The result of the research project due for completion by end of 2005 will be a practical "how-to" guide to provide a practical methodology for the analysis and synthesis of critical issues frequently encountered in strategic and project briefing. The final stage of the research project will be completed with the validation of the framework for strategic and project briefing through real-life case studies.

Construction briefing

Construction briefing is the activity of taking from a client a clear, unambiguous and explicit performance specification of a project expressed in a solution neutral format (Kamara *et al.*, 2001). The brief is the documentation that records the project performance specification. Briefing exists within an environment where a client wishes to introduce change within the organisation and being change focused the definition of the project is often prefixed by; invest, refurbish, relocate, expand, replace, extend, consolidate, etc (Kelly *et al.*, 2003a, b). In this paper the architectural programmer, architect, project manager, project sponsor, facilities manager, surveyor, engineer or whoever is responsible for the collation of information and the production of the brief is termed the "brief writer".

In order to undertake briefing effectively it is proposed that the brief writer should understand the strategic dimensions of the client's organisational change and record and make explicit the client's strategy for the project through a project mission statement. This activity necessitates the acceptance that the project is a separate, temporary activity for the client often unrelated in character to that of the client's core business. This implies an understanding of the concept of projects, project management and the importance of strategic fit within the client organisation.

The construction briefing process involves gathering, analysing, and synthesising information needed in the building process in order to, inform decision-making and decision implementation. Further, the brief document should contain all the information used in the design process as a set of evaluation criteria to ensure an optimal solution to the building problem. It is therefore a reference document against which audits can take place at any subsequent stage in the design, construction and

use phases of the building process. It is recognised that people from a number of different roles undertake the collation of material that will become the brief.

Briefing is a pragmatically instituted framework applied and adapted through experience (Barrett *et al.*, 1999). In the context of theories the literature review has highlighted the potential relevance of functional definition, communication, teams and team dynamics, culture and ethics, decision and organisational theory. In addition, the technical management frameworks of project, stakeholder, change, knowledge, value, risk, conflict and facilities management intertwine with the briefing process. The challenge for the research is to understand the contribution made by the technical and theoretical components in order to build a theoretically correct and validated technical process of briefing.

The research was commenced with the proposition that a technical process of briefing could be applied through existing systems that comprised those facets with the highest correlation with briefing. Also, for the proposition to be operationally relevant it was recognised that such systems should be capable of being nested within services such as project management and facilities management.

Mapping the briefing framework

The first stage of the research involved a detailed literature review to analyse and critique the briefing process (Kelly *et al.*, 1992; Nutt, 1993; Duerk, 1993; Green, 1996; Barrett *et al.*, 1999; Kamara *et al.*, 2001; Blyth and Worthington, 2001; Pena and Parshall, 2001). This was followed by a brainstorming session to validate the various theories and technical frameworks that impact the briefing process. The impact of each on the briefing process has been investigated and recorded in a “working document”. The following is a synopsis of each theory and technical framework with its relevance to briefing explained. A further proposition was evolved that the briefing framework included the following variables. This proposition was tested through an international questionnaire survey.

Theory of projects. A project is a change orientated event defined as an enterprise comprising of physical and non-physical activities that includes a pre-project stage to ensure effective planning and a post project stage to ensure successful absorption into core business. Therefore, a project is a separate, temporary activity from the organisations core business that aims to make a change. A brief for a project requires the initiator of the brief to accept change in their core business (Morris and Hough, 1987; Nicholas, 2001; Ramo, 2002; Woodhead, 2000).

Group theory, teams and team dynamics. The briefing team is project focused and interacting and comprised of individuals willing to sacrifice individualism for collectivism (Belbin, 1993; Cook, 1997; Hellriegel *et al.*, 1998).

Type theory, client types. It is important to ensure adequate representation of client groups to address client needs and to prevent distortion of the brief. Client needs should be properly defined to prevent an envisaged solution influencing the process that could result in brief writers attempting to solve the wrong problem (Kelly *et al.*, 1992).

Organisational theory and types of business. The briefing process must take into account that the team may be formed of many different types of organisations with different success criteria dependent on whether they aim to satisfy their shareholders, i.e. a plc, themselves, i.e. a partnership or if they are a not-for-profit organisation which

will differ greatly in terms of success criteria from those in the team who aim to make a profit from the project (Hodge *et al.*, 2003; Robbins and Coulter, 2002).

Decision theory. A good briefing team should not limit themselves to just one decision-making method and they should operate in contingency fashion by changing decision methods to best fit the problem and situation at hand (Hut and Molleman, 1998; Schermerhorn *et al.*, 2003).

Communication theory. The briefing process is essentially one of communication. Active listening should be encouraged in the briefing exercise to allow a free and complete flow of communication (Barrett and Stanley, 1999; Miller, 2003).

Culture and ethics. In managing the briefing team, the influence of culture dimensions such as language, time orientation, use of space, religion, power distance, uncertainty avoidance, individualism-collectivism, masculinity-femininity and long-term/short-term orientation must be taken into account. The briefing team may encounter ethical dilemmas which affect decision making in the briefing process (Hofstede, 2001; Schein, 1992).

Critical success factors and key performance indicators. The critical success factors in the briefing process range from clear objectives and requirements of the project to trust and involvement of key stakeholders. Key performance indicators include time, cost and quality as well as satisfaction of stakeholders (Belassi and Tukel, 1996; Pinto and Slevin, 1989).

Stakeholder management. In the briefing process, it is necessary to consider the interests of stakeholders, both primary and secondary, and maintain a balance between different stakeholder interests (Boddy, 2002; Carroll, 1993).

Change management. The briefing team must recognise that people are at the heart of any change process; therefore communication and involvement are key areas to ensure change management success. The key areas of change management are education, training, communication, team and leadership development (Denton, 1996; Kitchen and Daly, 2002).

Knowledge management. Knowledge management in briefing relies on teamwork, collaboration, face-to-face contact and effective communication structures. Fundamental to briefing therefore is the mapping of individuals' contributions to organisational knowledge in order to determine the membership of the briefing team (Bender and Fish, 2000; Kamara *et al.*, 2002).

Risk and conflict management. The importance of applying risk management techniques during the initial project appraisal phase of the briefing process is that they allow flexibility in consideration of alternatives in design and planning while the greatest degree of uncertainty exists. Collaboration and problem solving is preferred to gain true conflict resolution when time and cost permit in the briefing process (Flanagan and Norman, 1993; Gardiner and Simmons, 1995).

POE and PPE. Successes, failures and past experiences of what does and does not work well should be used to inform better decision making in the briefing process (Kransdorff, 1996; Preiser, 1995).

Strategic and project briefing

Kelly *et al.* (1992) in an early review of the process of briefing identified a two-stage approach consistent with the nature of the early stage design problem stating "First, it is the task of strategic management to identify the organisational needs and then to

decide whether a building (or buildings) of a general type and in a certain location is the most effective solution to those needs. Next, there comes the tactical management decisions on the design of the building given the activities to be accommodated”.

Kelly comments that the most striking feature about the two stage process is that the skills (and therefore the people) required at each stage are different. At the first stage, the decision-making unit requires a broad understanding of the client organisation, and only the most general advice on matters which relate to the building industry. At the second stage, the decisions require a more detailed understanding of the operational characteristics of the proposed built facility and more detailed input as to their construction implications. This suggests that there should be two briefing teams, each composed of individuals with knowledge pertinent to the particular stage. This logic is the genesis of an argument for a briefing exercise comprising two distinct events.

CIB Working Group 1 document entitled *Briefing the Team* CIB (1997) draws a distinction between a strategic brief and a project brief. The strategic brief setting the broad parameters of the project and includes such information as the project's mission statement, the context, the organisational structure and functions and the overall scope and purpose of the project. The project brief converts the strategic brief into construction terms, puts initial sizes and quantities to the elements of construction and gives them a budget. The project brief includes the aim of the design, details of the site, the functional space requirements of the client and outline specifications.

The consensus from the above is that briefing is comprised of two distinct stages, strategic briefing and project briefing and that the team required for each stage may be different.

This view of distinct events is contested by Barrett and Stanley (1999) who state “briefing must be seen as a process not an event”. This contention backed up by grounded theory research highlights the importance of interaction between the client and the client's professional advisers, the iterative nature of the development of the early design, and the necessity to accept change as an important component of the briefing process.

Green (1996) differentiates between “unitary clients” and “pluralistic” clients stating that for the former briefing is a straightforward activity whereas for the latter it is necessary to ensure a common understanding of the problem prior to moving to technical aspects of the brief. Green concludes by stating “... building design is no longer seen to be a straightforward technical process of problem-solving, it is now seen to be a social process based on iteration and learning. This revised interpretation of the building process is arguably best understood within the broader context of facilities management. From this point of view, the activities of briefing, designing, constructing, refurbishing and post-occupancy evaluation become constituent parts of an ongoing process which continues over time”.

The views of Kelly, Green, and Barrett and Stanley, are not necessarily contrary. Kelly and Green explicitly recognize the concept of the client team (pluralistic client) whereas Barrett and Stanley make reference only to the “client” but implicitly acknowledge a multi-faceted client organisation. Barrett and Stanley promote an “informal” organisational structure in which change is the norm whereas Kelly advocates a stage-by-stage approach acknowledging that membership of the briefing team may change at each stage. The stage-by-stage approach is reflected within the OGC Gateway Process.

Pertinent to this debate is Green's conclusion of the view of briefing within the wider context of facilities management that informs the direction of the argument presented in this paper.

Facilities management and briefing

Facilities Management is commonly viewed as a reactive and technical approach. However, Barrett (2000) states that: "facilities" is being propelled to centre stage as a strategic issue" as the realisation grows that the provision of an infrastructure tailored to suit the strategic objectives of business is fundamental to meeting core business aims. Barrett (2000) cites Beer (1995) who highlights the difference between operational FM and strategic FM as the "inside and now" and the "outside and future".

Hinks *et al.* (1999) in a study of FM definitions cites Becker, (1990) who states: "FM is responsible for co-ordinating all efforts relating to planning, designing, and managing buildings and their systems, equipment and furniture to enhance the organisations ability to compete in a rapidly changing world". Hinks *et al.* (1999) suggests that facilities management is an integrating profession in that it involves other professions in the construction industry in the same way as project management. Following a survey and focus group meeting of those involved in facilities management, Hinks *et al.*, concluded that an opportunity exists to capitalise on the strategic aspects rather than the technical areas of an FM service. This point demonstrates the importance of using facilities management knowledge at the strategic stages of a project.

Nutt (1993) suggests that the traditional brief, which deals with only the short term issues of project development, is inadequate and it is the involvement of FM in the strategic briefing exercise that ensures the facility is more adaptable to future change. Nutt states that too much emphasis has been on the design brief and more time should be spent on the organisational brief, the management brief as well as the design and construction briefs to ensure a balanced approach is undertaken. It is suggested that the balanced briefing process means paying due regard to future business organisation, designing with the future in mind, dealing with the management of continuous post-occupancy issues and risk. McLennan (2000) also outlines the importance of the business brief, the operational brief and the design brief in the integration of facilities management.

Szigeti and Davis (2002) report that briefs are not properly developed and do not include performance indicators or identified levels of demand. Smith *et al.* (2003) states that strategic client briefing is now an essential component of best practice in facilities management.

Nutt (1993) states that the briefing team; facility client, facility designer, facility manager and facility user all need to have input to the briefing process to ensure a successful facility. The range of issues to be taken into account by facilities management are:

- Client issues (business organisation, corporate strategy and objective);
- User issues (purpose, efficiency, comfort, safety, wellbeing and environment);
- Physical issues (space, structure, services, construction and maintenance);
- Financial issues (capital cost, development value and costs in use);
- Contextual issues (site and location); and
- Operational issues (post-occupancy management of facilities and support services).

Nutt highlights the primary importance of understanding the purpose of the project and the proposed use of the facility. In a study conducted by Heywood *et al.* (2004) the supposition is that the best briefs focussed on performance (outcomes and strategy) as opposed to compliance (outputs and tactics). This particular study of innovation in facilities planning and management (FPM) also reviewed the different roles applicable to FPM which included the client, users, management team, service provider contractor, sub contractors and delivery team. McLennan (2000) suggests that the best advocates for the incorporation of FM in the early stages of project development are those organisations that consider financing, designing, constructing, operating and monitoring the physical resource along with consideration of the organisation's business objectives. This necessitates an improved understanding of the customer requirements and allows performance feedback. It is suggested that the feedback loop in FM is essential for improved performance. McLennan stresses the importance of evaluating a project through the criteria detailed in the brief but highlights that most facility managers may not have access to this documentation. The criticality of the feedback loop is further emphasised in the ability of the facilities manager to feed information into future briefing exercises. This is supported by Eley (2001) who states that: "the perfect place to use knowledge gained from a POE is in creating the next new situation, in the case of a building, briefing the next one".

Preiser (1995), states that the facilities manager should be involved and be consulted in the early planning and pre-design phases of a project to highlight problems early and provide valuable information on building performance and operating costs. Preiser suggests that facility managers are the "keepers" of databases and information systems that contain valuable operational information on different building types and should be involved in the briefing process. Preiser states that: "a key aspect of POE is in the creation and propagation of information on various aspects of facility performance, to the mutual benefit of all areas of the FM programme".

Eley (2001) in a discussion of recommendations for improving the facilities management service states that it is important to "contribute to the brief before design starts". Eley suggests that a new niche role could be developed for facility managers in briefing which involves contribution from those facility managers with plenty of experience and knowledge in FM, for instance in different types of buildings with a range of POE's carried out. This knowledge would help any project in making decisions in the early stages of its inception and particularly those with recurring construction programmes.

In the context of information traditionally within the facilities management sphere, PPE and POE have been identified as essential components of the briefing framework. The primary aim of PPE is continuous improvement that involves transferring learning from one project to the next (Kransdorff, 1996). POE is a management tool within the broader context of facilities management, aimed at improving the performance and quality of buildings. It has evolved considerably over the decades from initially focusing on the design and technical criteria to broadening the scope to include the social context and to understand organisational culture (Preiser, 1995). Specifically POE has been defined as "a diagnostic tool and system that allows facility managers to identify and evaluate critical aspects of building performance systematically" (Preiser, 1995).

In summary of this section of the debate it is concluded that whether briefing is a process or a series of events it is widely acknowledged that it comprises two distinct parts, a strategic briefing stage where the focus is core business related and a project briefing stage where the focus is on the technical specification of the project. Similarly, facilities management is widely seen to have a focus on the strategy of the client organisation. A conclusion to be drawn from this correlation is that the facilities manager is in at least as good a position as a project manager or architect to lead the briefing process. This leads to a question of technically what tools and techniques are necessary in order for this to be carried out. In answering this question a view has to be taken as to whether the brief is the result of an investigation by one or more investigators or whether it is a facilitated study involving appropriate delegates to a workshop team at a specific point in the development of the project. If it is the latter then value management is an appropriate approach.

Value management brings to the fore value theory, group theory, type theory, function theory, decision theory, communication theory, culture and ethics. It relates to the technical frameworks of stakeholder management, change management, risk management and to some degree knowledge management. It is proposed here that the linkages between briefing and value management as a discovery and reporting process are sufficiently strong for value management to be a logical approach to facilitated briefing at both the strategic and project stages.

The research method for the testing of the propositions had to acknowledge the fact that the majority of clients, architects, project and facilities managers would not have experienced a facilitated approach to briefing and few would have experienced a highly structured investigative approach such as that advocated by Pena and Parshall (2001). A questionnaire approach was taken targeting client's and consultants in Hong Kong, USA and UK. In order to accommodate the lack of experience with facilitated and structured investigative approaches questions were asked at the level of the facets which comprise briefing. For example, if respondents felt strongly that team interaction and team dynamics was important to the briefing process then this might indicate a facilitated approach. If stakeholder identification and balance was not clear at the start of the briefing process then this might indicate an iterative investigative approach.

Testing of the propositions

Initial results from the questionnaire survey ($n = 52$) give a varied response to the proposition that the briefing process comprises those facets described earlier. The survey responses came mainly from architects (54 per cent) and project managers (40 per cent) working for a variety of organisations of whom 48 per cent had experience of writing briefs and 42 per cent of contributing to briefs. 58 per cent of respondents thought that the brief should recognise the distinction between the strategic brief and the project brief with the remainder believing that this distinction was not necessary.

The survey results indicated strong agreement to the following:

- Under the heading of projects, the brief should be compiled, completed and agreed prior to commencing design.
- Under the heading of client representation, it was considered necessary to ensure adequate representation of client groups to address client needs and to prevent distortion of the brief.

- Under the heading of change management, the brief writer must be able to understand the operation of the client business.
- Under the heading of knowledge management, successful briefing is dependent on understanding the clients' strategic goals.
- Under the heading of post-occupancy evaluation and post project evaluation, consultation of facility managers and end users benefits the briefing process.

The response to questions relating to the other facets was predominantly neutral leaning towards agreement of their importance. This would support the proposition that while a value management facilitated approach comprises those facets that have a high correlation with the variables of the briefing framework described earlier it does not strongly support the proposition that value management is considered the preferred method of briefing a construction project.

The survey respondents have focused on the importance of those facets which result in a correct brief and highlight that the brief should be compiled, completed and agreed prior to commencing design. However, how the brief is evolved has not excited a strong response. Value management is a facilitated technique and while there is evidence of its use in briefing in UK, USA and Australia this use is not widespread (Male *et al.*, 1998). The usual method of data collection for briefing is by investigation not facilitation. The survey is therefore positive regarding the importance of an understanding of some of the facets of briefing, neutral regarding others and silent on the use of value management.

The question posed by this investigation repeats the problem identified at the outset "can a respondent who has only compiled a brief using incremental, unstructured, investigative techniques envisage another process?" It is suggested that this question can only be answered through case study analysis.

Conclusions

The process of briefing is commonly regarded as the responsibility of the architect or the project manager as reflected by survey results. Briefing tends to be an iterative process involving meeting with the various stakeholders to both obtain information and to feedback design conclusions. Through this iterative process the value system of the client is gradually absorbed into both the brief and the design. In some instances the brief is recorded through the language of design and only scant performance specifications are recorded as written text. The North American process of architectural programming (structured investigative briefing) identifies the brief writer and records a detailed written specification. The architect as brief writer will tend to focus on activities necessary to inform the design.

This paper has explored the briefing process in the context of; the strategic brief, the mission of the project in order to fulfil a core business objective and, the project brief, the specification by performance of those components which combine to provide a facility which answers the core business objective. This paper has also explored those theories and management tools that combine to enable the brief writer in their task. Following the debate in past papers outlined above this research has attempted to ascertain whether structured investigative briefing or facilitated briefing are preferred strategies to existing unstructured, investigative, iterative processes.

Facilities management has been described as an integrated profession where the role of the facilities manager is to ensure that services are tailored to suit the core business they operate. A common error in most briefing exercises is that there are no FM personnel contributing to the brief before design starts resulting in operational issues in the latter stages of the project. In addition to this, a significant point identified in the review was that issues resulting from a POE are not always incorporated during the briefing process.

What is clear from the evidence presented in this paper in the context of briefing is that the facilities manager has an important part to play in the contribution of key POE/PPE data to the brief writer. What is also clear is that the facilities manager operating within the strategic framework of the client organisation and having the necessary skills is a natural choice as brief writer. Facilities managers' involvement is not strongly reflected in this research indicating perhaps that they do not consider briefing a natural role or that they do not possess the skills for its undertaking. It is concluded here that while briefing remains an unstructured investigative process the skills for which are learned through experience then architects and project managers will continue to dominate the activity.

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